



Document 22.10 Enhanced UI

Release Notes





Changelog

This changelog contains only significant or other notable changes to the document revision. Editorial or minor changes that do not affect the context of the document are not included in the changelog.

Rev	Date	Description
1.0	02-DEC-2022	Initial publication



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What's new in Document 22.10

- InEight Compliance integration
 - Task creation from Document You can now create and pin a new task from the Document viewer or the Links tab of any module and sync it with InEight Compliance. <u>Read more</u>
- Viewer
 - Compare files You can now compare different files in the Document viewer. <u>Read</u> more

• Submittals

- Track revision history You can now generate a revision history report from the History of a submittal. The report provides visibility into milestone dates and details per revision. <u>Read more</u>
- Set Details page The Set Details page has been added, so you can capture and view data against a submittal set. <u>Read more</u>
- Set ID field in submittals The Set ID field has been added to the Submittal Details page, so you can quickly see if the submittal is part of a set. <u>Read more</u>
- o Transmittal of submittal sets You can now transmit submittal sets. Read more
- Upload documents as managing company –Managing companies can now upload documents. This helps manage submittals for self-performing work or when the subcontractor or vendor is not uploading deliverables in Document, for example, if they email the documents. <u>Read more</u>
- Documents
 - Holding area processing prompt to supersede documents under review When the project Settings > Document > Allow superseding documents under review when processing holding area documents setting is selected, and you want to upload a new version or revision of a document that is under review, you are now prompted to either proceed with superseding some documents or cancel processing of the document from the holding area. Previously, the document was automatically superseded. <u>Read more</u>
 - Folder export You can now select a folder in the Documents register and export it and all its contents. The export includes a cover sheet with navigational links and an associated Microsoft Excel spreadsheet with the folder structure data. <u>Read more</u>
 - Reviewer type filter in Review pages An additional column has been added to the review grids that lets you filter entries by review type. This feature lets you easily and more effectively locate documents that require your attention, for example, when you are a mandatory reviewer.



• Transmittals

- Automatically notify recipients of future revisions Recipients who will not be able to access future revisions of a transmittal are now shown in a warning message. This helps to show who will not receive access to future revisions and notifications on future revisions. <u>Read more</u>
- Mail
 - Option to assign reference numbers when saving drafts A new project setting on the Miscellaneous tab has been added, so projects can specify whether a reference number is assigned or not assigned when saving a mail as a draft. Previously, a reference number was always assigned when saving mail as a draft. <u>Read more</u>
- Registers
 - Copy metadata text You can now copy data from a single cell on a register. When you right-click on a cell, the Copy text option is shown. Click Copy text to add the cell contents to the clipboard, and then paste elsewhere as needed.
- Project announcements
 - Edit project announcements All administrators can now edit or delete project announcements in the Project Announcements panel of the dashboard. Previously, only the primary administrator could edit or delete announcements.
- Configuration support
 - **Configure Lot section in Forms** You can now configure the information to show in the Lot section of a form, such as lot reference number, or title. To configure this for any of your existing form types, you must contact your InEight representative.
 - Support for dynamic tables in Forms You can now create dynamic tables where new rows can be added as needed in Forms. These tables can support drop-down lists, date and time selectors, numeric values, and text fields. To configure this feature for any of your existing form types, you must contact your InEight representative.



InEight Compliance integration

Task creation from document

Both in the field and in the office, project members often need to get a Compliance task marked on a file and assigned to the right team member. You can now create a task directly from the file viewer or the Links tab of any module. The task is created in Compliance and produces a bidirectional link between the two products.

To create a task from the viewer, right-click on an annotation in the PDF, and then select Link new InEight item > Link new Compliance task.



The New Compliance Task dialog box opens. Add the task name, due date, user contact, and description, and then click **Save**. The task is saved in Compliance and on the Links tab.

This feature is available for companies that use Compliance and have activated the integration via the InEight Integrations tab in Companies (Address book > **Companies**).

Viewer

Compare files

The Compare feature can be used to compare two documents that you have access to, for example, if you have drawings for HVAC and electrical or two revisions of the same document, you can now see how they align. The two documents are overlaid on each other to enable a side-by-side comparison. For vector files (such as DWG) an intelligent overlay occurs so that differences are automatically highlighted. For non-vector files the content is not compared, just overlaid.

To compare two different documents, select two documents in the Documents register. Expand the Actions menu, and then select **Compare**. The two documents are shown overlaid in the team view.

You can also use the compare feature to compare two revisions of the same document. To compare revisions, select any revision of a document, expand the **Actions** menu, and then select **Compare**. When



prompted, you can select another revision of the document, and then click **Compare**. You can also select the two revisions of the document to compare from the Documents register.

Submittals

Track revision history

You can now see the changes that have happened across multiple revisions of the submittal using the Submittal Revision report.

To generate this report, go to the History tab of a submittal, and then click **Generate revision report**.

A separate window opens where you can select the revision type to see the history (that is, All revisions, Latest or All superseded revisions), and then click the **Search** button to generate the report.

	DETAILS DEU	VERABLES COMMENTS SUPPORT DOCUMENT/	NG LINKS HISTORY TRANSMITTAL USER SECURIT		
Generate revision report					Close
Date	Event Type	Action By	Description	Rev	Sts
	•			-	-
2021-04-28 04:37 AM	Submittal Created	Greg Harrison (Houston Contracting)	Mew.more		

You can view the report in the window or click the **Export** icon to export it in Microsoft Excel, Microsoft Word, or PDF format.

Set Details page

The Submittals Set register has been updated to include details for each set, so you can quickly see information about the set.

	▼ Filter/Sort								View.	CN!	•
	D •								C Manage colu	mns 🗘 Search Sets	٩
Drag	a column header and drop	it here to group by that column									
									Date sent		
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	222		2021-10-12								
	BH-TEST-00001	100000	2022-11-17	STST1	SET1	0			1900-01-01	1900-01-01	19
	<u>1111</u>		2022-02-02	STST1	SET2	8MILES			2022-10-20	2022-10-27	19
	GHA-TRAINING01-001		2022-05-23	STST1	SET1	TS-DIS			1900-01-03	1900-01-03	19
	HCC-0002	1000	2022-04-05	STST1	SET2	000			1900-01-01	1900-01-01	19
	HCC-TRAINING01000001		2022-05-23								
	PROJ-TE-0001	it	2021-10-15	STST1	SET1	23444			2022-11-16	1900-01-02	19
	TE-002-1014		2021-10-15								
	TRAINING01-GHA-0001		2022-04-05								
	TRAINING01-HCC-GHA-000		2021-10-13								
		•									} ~



Submittals

When you click on a set ID, a Details page opens. You can add information about the set, including milestone dates. You can use these fields to manually track the milestones.

	DETAILS SUBMITTALS	SUPPOR	RTING		
					Cancel Save
* Title:				Date created:	
Revision:				Discipline:	
 Select a res 	vision		•	Select a discipline	•
npletion date	Forecasted completion date		Actual completion date		
8	yyyy-mm-dd		yyyy-mm-dd	0	
8	yyyy-mm-dd		yyyy-mm-dd	•	
	Person Person Select are upletion data	DETALS SUBSTILLS *Title Resistor Resistor		DEXAS DURATELS DEPORTING *Title Persiste Select a revision	DETALS SUBSTILLS

When you create a set from the Submittals register, the Submittal Set details page opens. Previously, a dialog box asking for the set ID opened.

You can see a list of all submittals in the set on the Submittals tab.

			DETAILS	SUBMITTALS SUPPORTING DOCUMENTATION			
							Cancel
Submittal No. 🏌	Title	Status	Rev	Submittal manager company	Submittal manager name	Issued to company	Issued to name
00-TE-106	Piping Submittal	OUTSTANDING	3	Houston Contracting	Greg Harrison	the second s	The Street of St
SP03-23231-A121001	the second s				The second se		

You can add supporting documents that pertain to the set on the Supporting documentation tab.

				DETAILS SUBMIT	SUPPORTIN DOCUMENTAT	3 ON				
Document (0)	$\odot \bullet \ominus \perp$									Cancel Save
	Attach files from desktop	Document No.	Type	Size	Rev	Sta	Discipline	Form	From company	
File attachment (0)	Attach from document register				No records available					

To add a supporting document, Click the Add icon, and then select either Attach files from desktop or Attach from document register.

Set ID field in submittals

The Set ID field in a submittal is automatically populated when the submittal is added to the set. You cannot update the Set ID field.



			DETAILS DELIVERABLES	COMMENTS SUPPO	ORTING INTATION	LINKS	HISTORY	TRANSMITTAL HISTORY	USER SECURITY					
Status: Outstanding	Closed out date:		Transmit Close out									Cancel	Save Re	issue
Submittal No:			* Title:							* Revision				
-0-000009			Testing 6/2							Select	Revision			•
* Description:														
Testing 6/2 - 2														
Created by:			Date Created:			Issued to company				*issued to	o usec 🕕			
Greg Harrison (Houston Contrac	ting)		2021-05-02			Select a company			Ψ.					*
* Area:			* Discipline:			*Submittal manage	e							
002 · TITLE2 (INACTIVE)		•	001 - TITLE1 (INACTIVE)			Greg Harrison			•					
Additional subm	ittal details:													
* Submittal category:			Spec section number:			Spec section name:				* Submitt	al package:			
Select a submittal category		-								Select	e submittal paci	lage		•
Alt reference number:			Schedule activity ID:			* Contract No:				Set ID:				
						Select a contract	no		•	TRAINI	NG01-GHA-0001			
Scheduled date	es		Milestone dates	Copy scheduled dates to fore	asted						Remaini	ing float O days 🕕 🛛 Total a	vailable float days	0 days
				Scheduled				Foreca	sted					
Scheduled item	Value		Milestone	Duration (days)	Comple	etion date	Float (days)	Duratio	n (days)	Completion	date	Actual completion date	Comple	60
"Kick off date	2022-11-28	0 1					No record	ds available.						^
Lead time	0		4				101100							
Late execution date	2022-12-08	•												
4		3.4												
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Transmittal of submittal sets

You can select a set from the Submittals Sets register, and then click Transmit > Create transmittal. The Transmittal Details page opens. You can then add the transmittal information, and then click Send transmittal. Document transmits the PDF version of the set. You can include a PDF version of a set in the transmittal.

Upload documents as a managing company

Previously, managing company users could not add documents, other than requirement documents or, or placeholder documents to the submittal. Managing company users who have been nominated as submittal managers can now add documents to the submittal.

To upload a document, click the **Document** icon in the Documents column on the Deliverables or Documents tab.

			DETAILS	DELIVERABLES	COMMENTS	SUPPORTING DOCUMENTATION	LINKS	HISTORY	TRANSMITTAL HISTORY	USER SECURITY			
e													
Ac	ions • 🕘 🛞 🗗 •									Sho	W. Deliverables •	Search Deliverables	Close
	Deliverable sumber	Turne	Description			Status	Documente	Due date					
	Derverable number	type	Description			status	Documents	Scheduled co	mpletion date	Forecasted	completion date	Actual completion date	
	D2-CN-419000001	D2				CN-419	0						^

The documents page opens. Click the **Add** icon to add documents.

Documents

Holding area processing prompt to supersede documents under review

When the project Settings > Document > Allow superseding documents under review when processing holding area documents setting is selected, and you want to upload a new version/revision of a document that is under review, you are now prompted to either proceed with superseding some

Documents



documents or cancel processing of the document from the holding area. Previously, the document was automatically superseded.

The dialog box lists the documents that are currently under review, and you can select the documents you want to supersede.

	Document No.	Title	Revision	Status
۵	BH-101	Site Plan	A	IR
	BH-101	Site Plan	A	in .
	DVD-2304	Site Plan	A	IFA

Folder export

The Export icon has been added to the toolbar and the right-click menu of standard and smart folders.

Ξ ဩ New ∨ Document / Documents ∨
Folder view: Standard 🗸 🗸
Training01 Project for Document
add folder
← 📔 00000 - 0 📝 Edit folder
Colora folder
1 0010 - 0010 Delete folder
💾 02092020 - 🙋 Rename
Copy
Paste
Generate link
221 - Smart
A 🔓 526 - Cor 🔲 Mobile
528 - 528

When you select the Export icon, a dialog box opens where you can add a title and description of the export file and indicate whether to include a cover sheet and metadata sheet. You can also select the file formats that must be included in the export.

The export is prepared in the background as a ZIP file. After the export has completed, a notification is sent with a link to download the zip file.

The cover sheet provides a table of contents that has links to each document in the folder. The metadata sheet shows the Excel export of the document metadata.

Note: This feature is available for standard and smart folders only.



Transmittals

Automatically notify recipients of future revisions

When a transmittal's Notify on revision option is selected, and there is a business reason that will prevent recipients from receiving access to future revisions, a warning box opens listing the names of the people who will not receive future revisions of the documents.

BH101 Ste Plan A IPI Recipient is not. BH101 Ste Plan A IPI Recipient is not.	
BH-101 Site Plan A IPI Recipient is not	a user
	auser
0VD-2304 Site Plan A IFR Recipient is not	a user

Mail

Option to assign reference numbers when saving drafts

When a reference number is not assigned, draft mails are assigned with a temporary reference number in the format of DRAFT-COMPANYID-AUTOSEQUENCE. This number will be replaced with the actual mail reference number when the mail is sent.

The new setting is shown below.

General				Cancel Save	
Disclaimer	Integration with other systems				
Contact Details	Bluebeam Studio Session linked to ysivaram2@tbupload.com <u>Remove link</u>				
Partners	Other				
Miscellaneous	Enable file attachments in:				
Mail	Attach comment spreadsheet to transmittals				
Document	Assign a reference number when saving as a draft Mail				
Packages	Maximum size of attachments for mail/tansmittals/packages is 1 MB:				
TenderDocs	1 🗘				
	Buddlebed and an eliter	Red Field and a second address of a field and	Rively debies in an an		
Forms	Published report caption:	Published report abbreviation.	Dispray forder items as:		
Forms	Published report caption: PREPORT CAP1	substree report abbreviation: 333	Code – Title	•	
Forms Lots	PREPORT CAP1 PREPORT CAP1 Disable standard login for users configured Single Sign On	addesized report addrewation:	Code – Title	•	
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